



Storyboard

Document Storage Basics

This storyboard demonstrates the basics of the Document Storage System which provides a centralized location to view and upload all documents.

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Person Home Page

Document Name

In order to make finding an uploaded document easier, program representatives created a consistent naming format that should be used for all documents uploaded to TFACTS. Recommendations were made for both the Document Name on the computer and for the **Document Name** as listed in **TFACTS Document Name** field. It is necessary that the document name on the computer be unique as TFACTS will not allow a document to be added which has the same physical file name (name of the document on the computer) as an existing file for the selected Document Type, irrespective of case or person.

File Name (name of the document on the Computer)

- This name must be unique. Once the document is uploaded in TFACTS this name does not display, but it is how TFACTS identifies the document behind the scenes.
- TFACTS will generate an error message if attempting to upload another document with the same file name as one used previously. The error states, "A document already exists with this File name. Please rename and try again."
- The approved naming convention for the File name: Child First Name_Child Last Name_Form Name_Date
 - Example: **Flavia_Deluce_CFTM_Summary_02052019** or **Flavia_Deluce_Drug Test Reports_11122020**
 - If a file name error occurs when attempting to upload a document, change the name of the file on your computer by adding an underscore and a number.
 - Example: **Flavia_Deluce_CFTM_Summary_02052019_1** or **Flavia_Deluce_Drug Test Reports_11122020_1**

Document Name (name of the document in TFACTS)

- The file will be uploaded from the Persons Documents link. TFACTS knows the document belongs to that person and to any others that the document is associated with.
- The approved naming convention for the Document Name (name in TFACTS) is simply the Form Name_Date
 - Example: **Case Summary_02052019** or **Life Skills Assessment_02052019** or **Drug Test Reports 1112200**

Note: Think of it this way-- Your computer houses the file names, TFACTS is the file drawer. You cannot have two files with the same names in the file drawer.

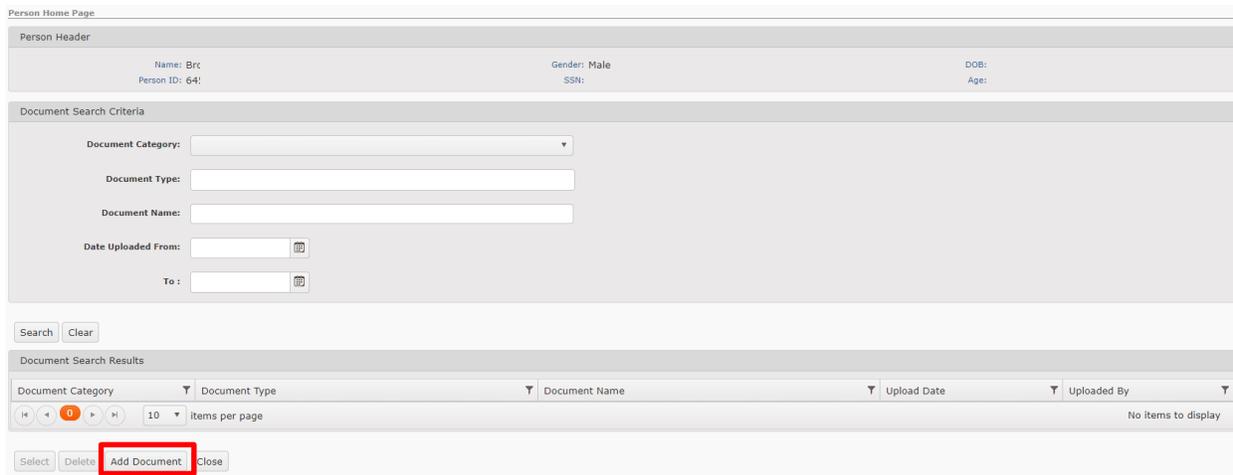
Adding a Document

New documents will be uploaded into TFACTS and associated to a person via the **Person Home Page**. Access the **Person Home Page** via a Person Search, Workload Page> Person Icon, or clicking on a Person Name link.

- Click **Documents**



- **Document Search** Criteria screen displays
- Click **Add Document**



Add Document screen displays

- Select the **Document Category*** via the dropdown
- Select the **Document Type*** via the dropdown (list populates based on Document Category selected)
- Enter the **Document Name*** (use established Name convention from page 2)
- Enter the **Date on Document**, manually or via the calendar icon (optional)

Note: Fields with a red asterisk are required fields.

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Person Home Page > Documents

Person Header

Name: Bro...
Person ID: 64!

Gender: Male
SSN: xxx-xx-xxxx

DOB:
Age:

Add Document

Document Category:*

Document Type:*

Document Name:*

Date on Document:

- Add **Other Associated Persons** – there are 3 methods
- Click **Add**

Other Associated Persons

Person ID

Name

No items to display

Add Remove

- **Associated Persons** screen – add **Associated Persons**
 - Click to highlight appropriate person(s) displayed – these are person(s) already associated to the person in focus
 - Click Choose.

Note: Press Ctrl key to highlight multiple persons at a time.

Associated Persons

Person ID	Full Name	DOB	Age	Association
68	Cc			Birth Mother
68	Cc			Other Relative
24	Br			Birth Father
29	Cc			Stepfather
31	Dt			Other DCS Staff
21	Cc			Other Non-relative
23	Fo			Family Services Worker
34	Le			Other Non-relative
36	Cf			Mental Health Personnel
36	Cf			Service Provider

10 items per page 1 - 10 of 38 items

Person Search

Choose Cancel

OR

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- **Person Search** – search and find a **Person**
 - Click **Person Search**



- **Person Search** screen displays – use any of the **Person Search Criteria** to perform a person search
- Click **Search** to display **Person Search Results**

Person Search Criteria

Person ID:

SSN:

Reference Type: Reference Number:

Last Name: First/Middle Name:

Date of Birth: Gender: Race:

Advanced Search Criteria

Search **Clear Form**

- To View information on a Person, click **select**
- Click **choose** to add the Person to the Associated Person List

Person Search Results

Result(s) 1 - 1 of 1 Page 1 of 1

[AD]:Adopted,[D]:Duplicate, [E]:Employee, [EP]:Employee-Previous, [HE]:Hazard-Environment, [HR]:High Risk, [HS]:Hazard-Safety, [SP]:Substantiated Perpetrator, [TBI]:Potential TBI Sex Offender Match

[RA]:Asian, [RB]:Black/African American, [RI]:American Indian/Alaska Native, [RH]:Native Hawaiian/Other Pacific Islander, [RM]:Multi-Racial-One Race Unknown, [RU]:Unable to Determine, [RW]:White

	Person ID	Name	Address	Gender	DOB	SSN
choose	58:	Col [RL]	(map)	Female		

Close **Add Person**

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- Locate the **Person** who has been added to the **Associated Persons** screen display
- Click to highlight the person
- Click **Choose**

Associated Persons

Person ID	Full Name	DOB	Age	Association
68	Cc			Birth Mother
68	Cc			Other Relative
24	Br			Birth Father
29	Cc			Stepfather
31	Dl			Other DCS Staff
21	Cc			Other Non-relative
23	Fo			Family Services Worker
34	Le			Other Non-relative
36	Cf			Mental Health Personnel
36	Cf			Service Provider

10 items per page 1 - 10 of 38 items

Person Search

Choose Cancel

OR

- **From Event**
 - Click **Event Search**

Person Home Page > Documents Search

Person Header

Name: Bro
Person ID: 64

Gender: Male
SSN: :

DOB:
Age: 18 Yrs

Select Other Persons

From Event

Event Date:

Event Status:

Event Name:

Event Search

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- Perform an **Event Search** via any or all of the **Event Search Criteria** this will allow for a search of events the person in focus is a part of
 - **Date From and To** – enter the dates manually or use the calendar icon
 - **Event Type** – click in the box to scroll and make a selection
 - Click **Search**

Person Home Page > Documents Search > Add Document > Select Other Persons

Person Header

Name: Colli Person ID: 683:	Gender: Female SSN: .	DOB: Age: 39 Yrs
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Event Search Criteria

From Date: 

To Date: 

Event Type:

- **Event Search Results** appear
 - Click to highlight the **Event** with the **Associated Persons** to display
 - Click **Choose**

Event Search Results

Event Date	Event Summary	Status	End Date
03/30/2016	Si tc al	Approved	03/30/2016
02/10/2015	Pi Ir Yc	Approved	02/10/2015
07/15/2014	D Si Pi	Approved	07/15/2014
05/28/2014	Pi Ir fo	Approved	05/28/2014
03/29/1984	Ir Pi N	Approved	03/29/1984

10 items per page 1 - 5 of 5 items

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- **Associated Persons** screen displays those persons associated to the event selected
 - Click to highlight appropriate person(s) displayed
 - Click **Choose**

Note: Press Ctrl key to highlight multiple persons at a time.

Person ID	Full Name	DOB	Age	Association
68	Cc			Birth Mother
68	Cc			Other Relative
24	Br			Birth Father
29	Cc			Stepfather
31	Dl			Other DCS Staff
21	Cc			Other Non-relative
23	Fo			Family Services Worker
34	Le			Other Non-relative
36	Cf			Mental Health Personnel
36	Cf			Service Provider

10 items per page 1 - 10 of 38 items

Person Search

Choose Cancel

- **File to Attach***
 - Click **Select files....**(ensure file is named using the established Name convention from page 2)
 - A Popup appears, search to locate and click on file to attach
 - Click **Open**

Note: If the name of the file attempting to load has the same name as another file with the same Document Category and Document Type for the same person an error message will occur. See **Document Name** section (page 2).

- **Comments** (optional)
- Click **Save**

Person ID	Name
68	Cc
24	Bi
36	Cl

1 - 3 of 3 Items

Add Remove

File to Attach*: Select File

Comments:

Save Cancel

Continue to next subtopic.

Linking to an Event

When a new document is being added it can be linked to an **Event Type** when the **Document Type** is associated to an **Event Type**. Linking to an **Event Type** allows for better organization and association of documents to areas of importance within TFACTS.

Linking a document to an **Event Type** will link the document to all participants listed in that **Event**. See the [Document Reference Table](#) for a complete list of linkable events.

- Select **Document Category**
- Select a **Document Type** associated with an **Event Type**. A popup box will display with any available **Events** that can be linked to. **Documents** linked to an **Event** will also be linked to all participants in that **Event**.

Note:

- *The only document that will to link to a CPS Intake will be the CPS Intake CS-0680.*
- *The only document that will to link to a CPS Case will be the CPS Case Summary and Classification Decision of Child Abuse/Neglect Referral CS-0740.*

- Click on row to highlight the **Event** to link
- Click **Select**

The screenshot shows the 'Person Home Page > Documents Search' interface. On the left, the 'Add Document' form is visible with the following fields:

- Document Category:** Permanency Planning
- Document Type:** CFTM Summary
- Document Name:** (empty)
- Date on Document:** (calendar icon)
- Other Associated Persons:** (Person ID: 0, Add, Remove buttons)
- File to Attach:** (Select File button)
- Comments:** (text area)

On the right, a 'Choose Event' popup window is open, displaying a table of events:

Event Date	Event summary	Status
05/02/2018	JJ - Custody PP Initial	In Progress
04/06/2016	JJ - Program Transfer -	Approved
03/08/2016	Initial Custody - Worker	Approved
09/12/2013	CPS - Transition Non-	Approved

At the bottom of the popup, there are navigation controls (back, forward, search, etc.), a '5 items per page' dropdown, and a '1 - 4 of 4 items' indicator. A red box highlights the 'Select' button at the bottom left of the popup.

- Enter the **Document Name*** (use established Name convention from page 2)

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- Enter the **Date on Document**, manually or via the calendar icon (optional)
- **Other Associated Persons** – displays persons associated to the event that the document will also be linked to
- **File to Attach***
 - Click **Select files....**(ensure file is named using the established Name convention from page 2)
 - A Popup appears, search to locate and click on file to attach
 - Click **Open**

Note: If the name of the file you are attempting to load has the same name as another file with the same Document Category and Document Type for the same person an error message will occur. See **Document Name** section (page 2).

- **Comments** (optional)
- Click **Save** if everything is correct. OR
- Click **Clear** to remove the linked **Event**
- Click **Change Event** will display the popup box again to select a different **Event**. The **Document Name**, **Date on Document** and **File to Attach*** (ensure file is named using the established Name convention from page 2) will need to be re-entered.

The screenshot displays a web form for document storage. At the top, there are dropdown menus for 'Document Category*' (Permanency Planning) and 'Document Type*' (CFTM Summary), followed by a text input for 'Document Name*' and a date picker for 'Date on Document:'. Below these is a section for 'Associated Event' with details: 'Event Date: 05/02/2018', 'Event Status: In Progress', and 'Event Name: JJ - Custody PP Initial'. This section includes 'Change Event' and 'Clear' buttons. Underneath is a table for 'Other Associated Persons' with columns for 'Person ID' and 'Name', listing three entries. Below the table is a 'File to Attach*' section with a 'Select File' button and a 'Comments:' text area. At the bottom left, there are 'Save' and 'Cancel' buttons.

Continue to next sub topic

Document Search and Results

Navigate to Person Home Page, click **Document**.

Click **Search** to return all Documents or use the Document Search Criteria to narrow your search.

- **Document Category** –use the dropdown to make a selection
- **Document Type** – click in the box to scroll and make a selection
- **Document Name** – (use established Name convention from page 2)
- **Date Uploaded From and To** – enter the dates manually or use the calendar icon
- Click **Search**

The screenshot shows the 'Person Home Page' interface. At the top, there is a 'Person Header' section with fields for Name (Brc), Person ID (64), Gender (Male), SSN, and DOB/Age. Below this is the 'Document Search Criteria' form, which includes a dropdown for 'Document Category', a text input for 'Document Type', a text input for 'Document Name', and two date pickers for 'Date Uploaded From' and 'To'. A red box highlights the 'Document Search Criteria' form. Below the form is a 'Search' button, also highlighted with a red box, and a 'Clear' button. Below the search area is the 'Document Search Results' section, which shows a table with columns for Document Category, Document Type, Document Name, Upload Date, and Uploaded By. The table currently displays 'No items to display'.

Document Search Results will be displayed and columns can be filtered by using the  in the column headers.

Note: If Document Name displays ****Restricted Document**** the employee does not have access to view these types of documents. (Example: SIU documents)

The screenshot shows the 'Document Search Results' table with the following data:

Document Category	Document Type	Document Name	Upload Date	Uploaded By
CPSI_CPSA	Border Agreement Non-custodial Immediate Safety Plan	*****Restricted Document*****	05/16/2018 10:02 AM (CT)	Steuart, Robert M
CPSI_CPSA	Photographs of Physical Injury or Condition with Accompanying Photos	*****Restricted Document*****	05/15/2018 04:22 PM (CT)	Black, Tammy
CPSI_CPSA	Special Investigations (SIU) - Notification of Case Initiation and Closure	*****Restricted Document*****	05/15/2018 04:20 PM (CT)	Black, Tammy

Below the table, there is a pagination bar showing '10 Items per page' and '1 - 3 of 3 items'. At the bottom, there are buttons for 'Select', 'Delete', 'Add Document', and 'Close'.

Continue to next sub topic

Deleting a Document

Deleting a Document is specific to the Person in focus. To Delete a Document navigate to the Person Home Page and click on **Documents**. Only persons with necessary user security may delete CPSI/CPSA documents.

Event Types that will delete from multiple persons at a time are CPS Intakes, CPS (I / A) Investigations, Resource and Home Study, the same process applies but the action must be performed under the **Event** itself to remove the document from all members of the Event.

- Click **Search** to return all Documents
- Click on the row of the item to be deleted. It will be highlighted orange.
- Click **Delete**

- A popup window appears for verification the record is to be deleted
- Click **Ok** to proceed with deletion or click **Cancel** to abort the deletion.

- **Document Search Criteria** screen will appear again

Verify the Document has been deleted.

Continue to next sub topic

Viewing and Modifying Document Details

- Click the desired row to view
- Click **Select**

Person Home Page

Person Header

Name: Brc Gender: Male DOB:
Person ID: 64 SSN: Age:

Document Search Criteria

Document Category:

Document Type:

Document Name:

Date Uploaded From:

To:

Search

Document Search Results

Document Category	Document Type	Document Name	Upload Date	Uploaded By
Education	Attendance Records	Test Doc	05/03/2018 09:48 AM (CT)	Hui

Navigation: 10 Items per page 1 - 1 of 1 Items

The **Document Detail** screen displays the following:

- **Document Category**
- **Document Type**
- **Document Name***– This area can be modified if needed/appropriate (use established Name convention from page 2)
- **Date on Document** – This area can be modified if needed/appropriate
- **Comments** – This area can be modified if needed/appropriate
- **Uploaded By**
- **Upload Date**
- **Other Associated Persons** – lists other persons also linked to this document
- Click **Apply** or **Save**

Person Home Page > Documents Search

Person Header

Name: Bri Person ID: 64	Gender: Male SSN:	DOB: 09/11/2000 Age: 18 Yrs
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Document Detail

Document Category: Education

Document Type: Attendance Records

Document Name*: Test Doc

Date on Document: 05/02/2018

Comments: testing

Uploaded By:

Upload Date: 05/03/2018 09:48 AM

Other Associated Persons

Person ID	Name
No items to display	

Preview

Apply **Save** Cancel

Continue to next sub topic

Previewing a Document

From the **Document Detail** screen

- Click **Preview**

Person Home Page > Documents

Person Header

Name: Brc Gender: Male DOB:
Person ID: 64! SSN: Age:

Document Detail

Document Category: Education
Document Type: Attendance Records

Document Name: Test Doc

Date on Document: 05/02/2018

Comments: testing

Uploaded By: Hui
Upload Date: 05/03/2018 09:48 AM

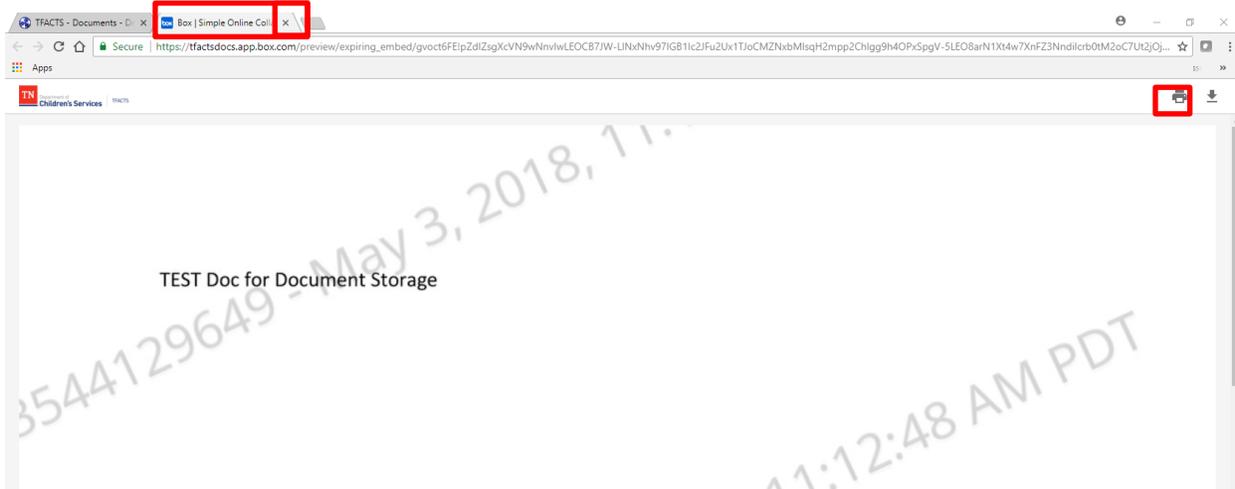
Preview

Apply Save Cancel

- A new browser tab will open previewing the document

Note: The displayed document will be watermarked for security reasons.

- Close tab or proceed to Printing or Downloading the Document.



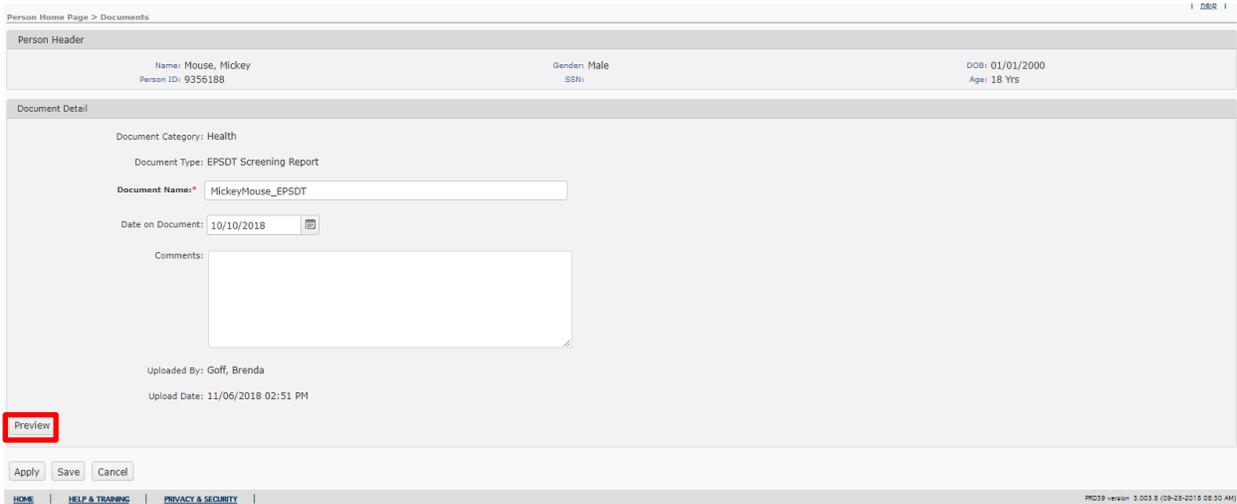
Continue to next sub topic

Printing a Document from Preview (Watermark Prints)

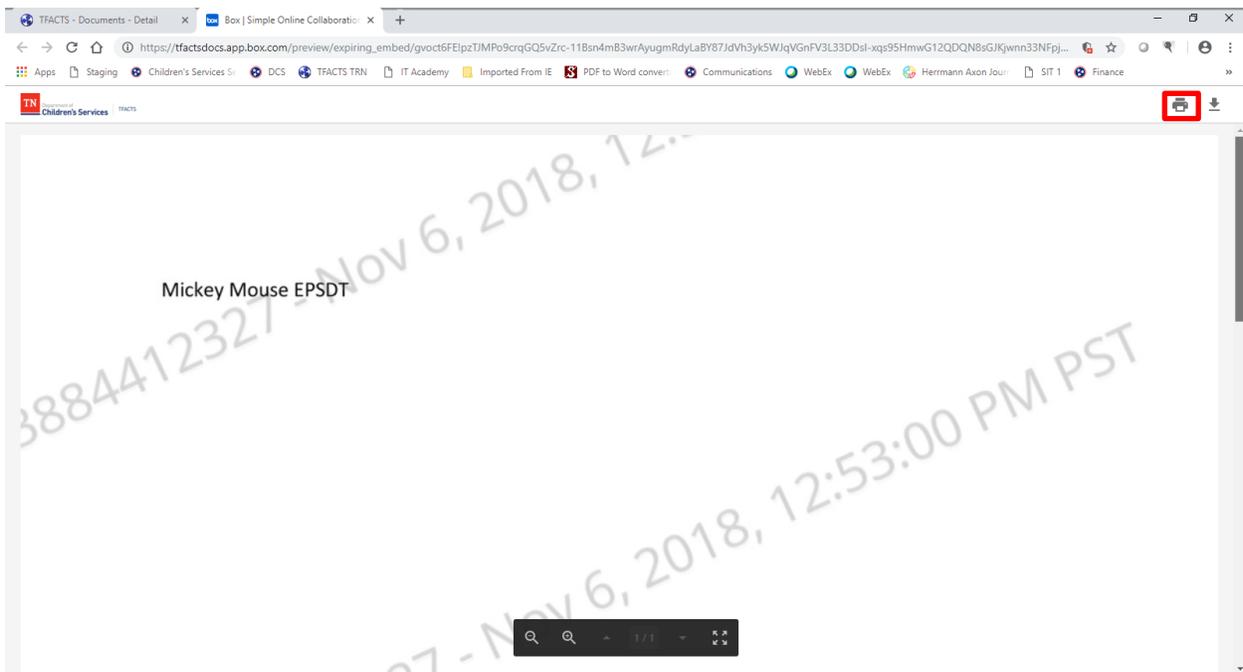
When printing a document from the **Preview** a watermark will print on the document

From the Document Detail window

- Click Preview

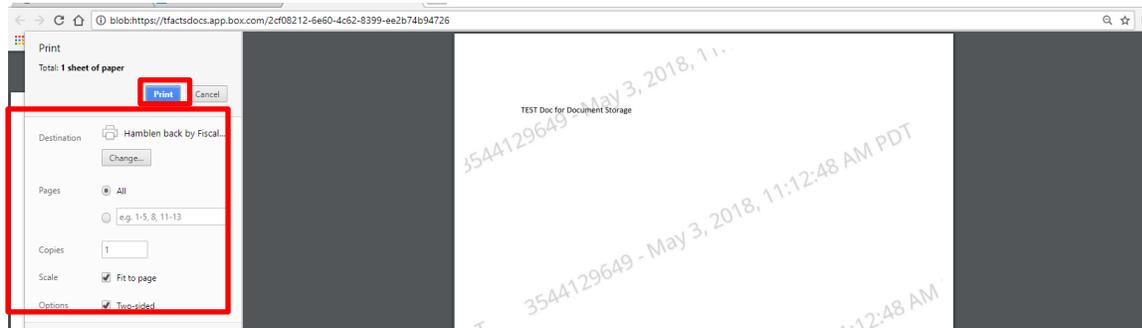


- Document will display with watermark
- Click the Print icon in the upper right corner



- Verify the print settings
- Click **Print**

Note: Document will be printed with the Watermark included.



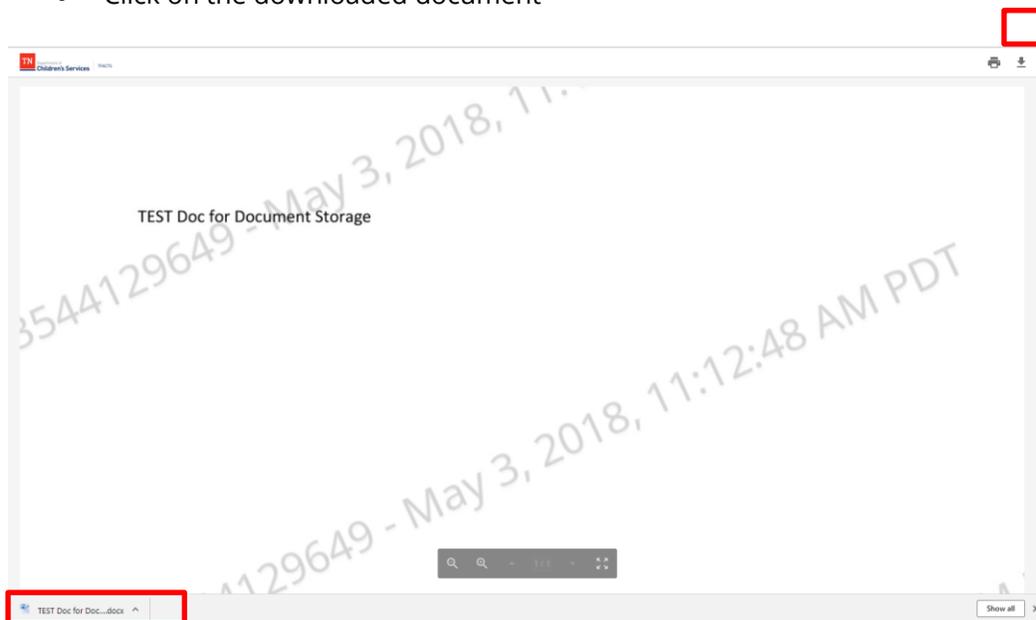
Print (No Watermark) / Download Document

From the Document Detail window

- Click Preview

From the Preview

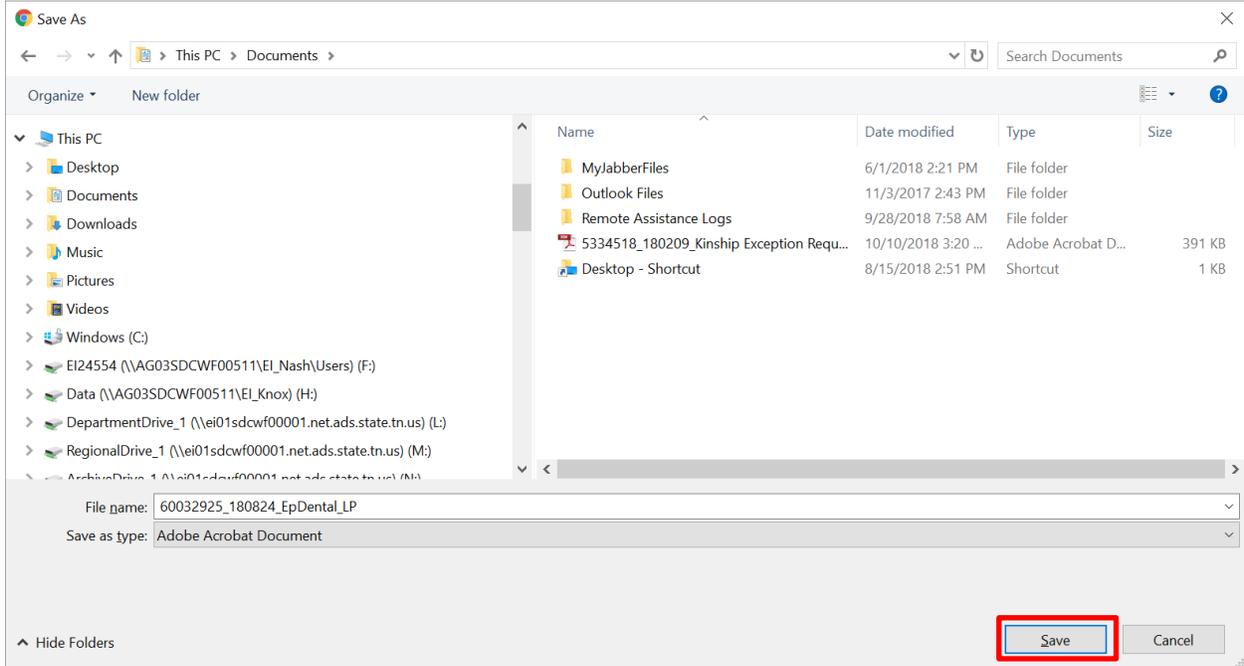
- Click the Download icon
- The download will display at the bottom of the screen
- Click on the downloaded document



Note: Enable Editing may need to be clicked to enable options to work with the document

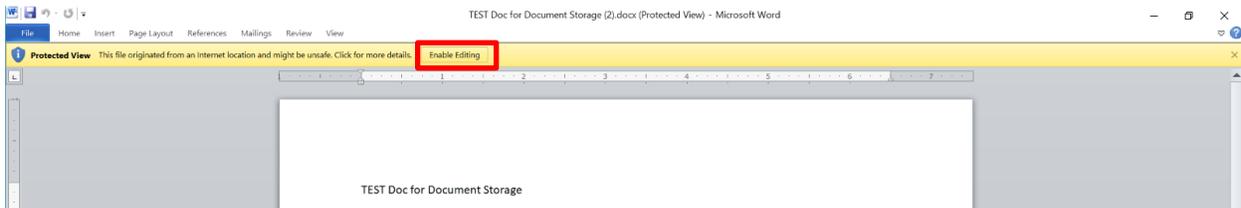
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- Save options will display
- Select where to save the document to, then click Save

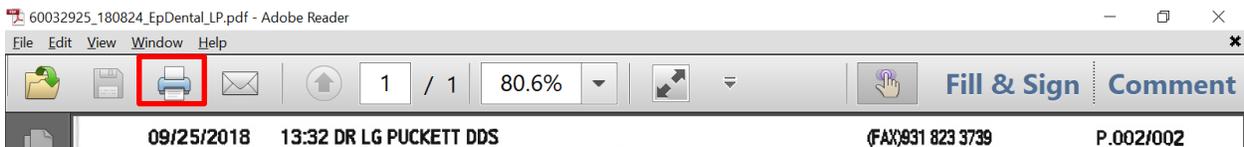


- Open the document to view

Note: Enable Editing may need to be clicked to enable options to work with the document



- PDF version of the document will display
- Click the Print Icon



- Verify the print settings
- Click **Print**

You have completed this storyboard